

Business/Self-Employment Income and Expense Check List

Name of Business: _____ % You Own: _____

Business Type: _____ Owners: _____

Business Income _____

HOME OFFICE EXPENSES:

GENERAL EXPENSES:

Advertising _____

Business Insurance _____

Business License _____

Meals & Entertainment _____

Supplies _____

Equipment _____

Stationary/Office Expenses _____

Business Fees & Dues _____

Legal/Accounting/Tax Prep _____

Bank Fees _____

Loan Interest _____

Uniforms _____

Travel _____

Cell Phone _____

Dump Fees _____

Delivery/Freight/Postal _____

Salaries _____

Subcontractors _____

WorkSafe BC _____

BUSINESS LOCATION EXPENSES:

Rent _____

Utilities _____

Phone _____

Property taxes _____

Maintenance & Repair _____

Internet _____

Personal vs. Business Use (area) _____

Electricity _____

Natural Gas _____

Internet _____

Phone _____

Municipal Utilities _____

Insurance _____

Mortgage Interest _____

Property Tax _____

Rent _____

Strata Fees _____

Office Expenses _____

Maintenance & Repairs _____

VEHICLE EXPENSES:

Personal vs. Business (km) _____

Year/Make/Model _____

Current Value _____

Lease Payments _____

Loan Interest _____

Insurance _____

Fuel _____

Maintenance & Repairs _____

Parking _____

RTS Reliable Tax Service – Client Identification Form

Please complete form with accurate information, as registered with the CRA. Inaccurate or incomplete information will impact the filing of your tax return, and will delay processing

First Name _____ SIN _____

Last Name _____ DOB (D/M/Y) _____

Mailing Address _____

City _____ Province _____ Postal Code _____

Phone # _____ Alternate Phone # _____

Email address _____

MARITAL STATUS

Common Law Married Single Separated Divorced Widowed

SPOUSE OR COMMON LAW PARTNER (if applicable)

First Name _____ SIN _____

Last Name _____ DOB (D/M/Y) _____

Net Income (if they are not filing their taxes with us) \$ _____

DEPENDANTS

First & Last Name	Relation	DOB (D/M/Y)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Date of Arrival(s) (if you/spouse are new to Canada) (D/M/Y each) _____

Date of Marital Status Change (if change from last filing) (D/M/Y) _____

NOTES _____

Common Tax Slips and Income Tax Deductions

For a basic personal return, these are the most common tax slips and deductions. Please note business/self-employment and rental income expenses are not included on this list.

<u>TAX SLIPS</u>	<u>TAX SLIPS</u>	<u>DEDUCTIONS</u>
T2202	T4RIF	Childcare Expenses
T3	T4RSP	Donations
T4	T5	Medical Expenses
T4A	T5007	RRSP
T4AP	T5008	Student Loan Interest
T4E	T5018	Tax Preparation Fees
T4AOAS		Union or Professional Dues

Common Tax Slips and Income Tax Deductions

For a basic personal return, these are the most common tax slips and deductions. Please note business/self-employment and rental income expenses are not included on this list.

<u>TAX SLIPS</u>	<u>TAX SLIPS</u>	<u>DEDUCTIONS</u>
T2202	T4RIF	Childcare Expenses
T3	T4RSP	Donations
T4	T5	Medical Expenses
T4A	T5007	RRSP
T4AP	T5008	Student Loan Interest
T4E	T5018	Tax Preparation Fees
T4AOAS		Union or Professional Dues

RTS Reliable Tax Service – Corp Identification Form

Please complete form with accurate information, as registered with the CRA. Inaccurate or incomplete information will impact the filing of your tax return, and will delay processing

Business Name _____

Business # _____ Year end (D/M/Y) _____

Mailing Address _____

City _____ Province _____ Postal Code _____

Phone # _____ Alternate Phone # _____

Email address _____

GST Filer? Yes No

Filing GST With Us? Yes No

Filing Frequency? Yearly Quarterly Monthly

DIRECTORS

First & Last Name

NOTES _____

Rental Income and Expense Checklist

OR

Sale of Property Check List

Address: _____ % you own: _____

Owner: _____ Joint Owner: _____

RENTAL

ADDITIONAL RENTAL EXPENSES:

Rental Income _____

RENTAL EXPENSES:

Personal vs. Rental Use (area) _____

Advertising _____

Insurance _____

Legal/Accounting/Tax Prep _____

Bank Fees _____

Electricity _____

Natural Gas _____

Internet _____

Phone _____

Cable _____

Municipal Utilities _____

Insurance _____

Mortgage Interest _____

Property Tax _____

Strata Fees _____

Maintenance & Repairs _____

Major Purchases/Renos _____

PROPERTY SALE

PROPERTY SALE EXPENSES:

Purchase Date _____

Purchase Price _____

Purchase Legal Fees _____

Sale Date _____

Sale Price _____

Sale Legal Fees _____

Sale Commission _____

Improvements _____

ADDITIONAL SALE EXPENSES:

